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ABSTRACT

In 1973, the Northwest Adult Education Association distributed a questionnaire to the membership requesting information about accountability practices in the institutions represented. The survey format was open-ended, which facilitated diversity in the responses. Returns were categorized by types of institutions: Adult Education Training Centers, Non-Academic Associations, Community Colleges, Cooperative Extension Services, Libraries, Proprietary Enterprises, School Districts, University Extensions, and the U. S. Air Force. The findings of the survey are summarized and responses condensed with relation to various aspects of accountability. Many of the agencies included with their responses sample materials illustrating various procedures used, some of which are included in the appendixes, together with the questionnaire used. (KP)

ED 084404

ACCOUNTABILITY PRACTICE IN ADULT EDUCATION

A SURVEY AMONG ITS MEMBERSHIP

SPONSORED BY THE NORTHWEST ADULT EDUCATION ASSOCIATION

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Publication of this report was financed by the Region X Adult Education Staff Development Program of the Northwest Regional Educational Laboratory.

NWAEA ACCOUNTABILITY SURVEY

Early in 1973, the Northwest Adult Education Association distributed a questionnaire to its membership requesting information about accountability practices in the institutions represented. This regional association includes a diverse mixture of people engaged in teaching adults. Some are adult basic educators engaged in instruction in literacy and related knowledge that the individual for some reason did not attain through public school experience in youth. Some are engaged in the on-going professional up-dating of medical personnel, nurses, lawyers, engineers, school administrators, and other professional practicioners. Some specialize in education for farmers and businessmen serving agriculture. Some are concerned with rehabilitation of the disabled. Some are conducting training programs for industry. Some specialize in educational programs for churches. Some concentrate in nutrition, child care, and other family living topics. Some are focused on the training of adult leaders for youth groups. The list is longer, but these examples indicate the heterogeniety of the group.

The area covered includes five U. S. states and two Canadian provinces. The findings of the survey are not intended to represent the viewpoints or perceptions of the entire membership since only 71 of 216 instruments were returned. It is noted, however, that responses came from every state and province in the region and from all the usually identified categories of membership.

The committee that developed the project had been directed by the NWAEA board "to study and report to the members the accountability practices in relation to adult education presently existing or being developed within the region....." The committee contracted with William W. Pierson, Department of Anthropology, Oregon State University, to design and distribute the survey questionnaire. Mr. Pierson and Jean W. Scheel, of Oregon State University, chairman of the NWAEA committee on Accountability Practices, collaborated in analyzing the responses and preparing this report. Jindra Kulich of the University of British Columbia and Charles Lafferty of the University of Alaska were members of the regional committee. Valuable assistance was rendered by John Niemi of UBC; Isabella McQuesten, Ann Litchfield, Alberta Johnston, and Thomas Hogg of Oregon State University; and Aubrey Gardner of the Northwest Regional Educational Laboratory in Portland.

The survey format was open-ended, which facilitated diversity in the responses but complicated the task of analysis. For the purposes of this report, the responses were categorized by types of institutions as follows:

Adult Education Training Centers	4
Associations, Non-Academic	4
Community Colleges	14
Cooperative Extension Services	17
Libraries	5
Proprietary Enterprise	3
School Districts	8
University Extension	14
U. S. Air Force	2

FINDINGS IN BRIEF

*Nearly all of the respondents, in all categories, showed a systematic and regular concern with accountability.

*A principal purpose of accountability practice seems to be to influence funding sources to assure continued support. The predominant meaning associated with accountability was accounting for the use of time and expenditure of money to carry out a set of goals.

*Different categories of institutions have developed and are using different procedures and data systems for this purpose. One of these, SEMIS, is used by Cooperative Extension Services in all states of the region and involves daily reporting of time usage by all professional personnel. A system used by a group of Community Colleges in Oregon in connection with the Adult Basic Education Program involves measurement of units of improvement in certain skills of the adult students and relates these to the instructional costs represented. Continuing Education institutions generally use a course or a particular activity (such as a workshop, conference, or seminar) as a unit for budget and accountability purposes. Institutions that emphasize vocational training or rehabilitation generally watch the employment record of their students as a measure of institutional performance. Several of these different accountability systems are explained in some detail in appendixes to this report.

*Despite some diversity in procedures and techniques, most of the respondents seem to share a common set of tasks for which they use accountability devices. Among these tasks are:

--Establishing or identifying goals or objectives
--Allocating resources
--Evaluating staff (or instruction)
--Measuring productivity

*Communication among agencies on the subject of accountability appears to be limited to certain people or institutions who are known to have similar interests and who are not competitive threats. The subject is a sensitive one. In addition, the communications problem is complicated by differences in terminology, data units, and program philosophies.

*Respondents made no references to a professional association or society as a factor in accountability. Neither was there any reference to employee bargaining units or unions. It would appear, nevertheless, that the existing regional association, NWAEA, might serve a useful role in facilitating and supporting improved communication and practicable mutual effort.

*There presumably is opportunity for improvement of techniques in individual agencies for adapting ideas that have proved successful elsewhere. Among the things that various agencies are developing that might have expanded usefulness are:

--Scales of adult learning
--Measuring devices
--Systems for recording time usage

--Formulas for determining costs per unit of output
--Frameworks for stating objectives
--Computer programs for assembling and analyzing data
--Presentations of data for informing funding sources
--Techniques for evaluating staff

*There also should be efficiencies of scale in combined usage of materials for common purposes that are unique to the field. (Such as some aspects of staff training.)

*There would seem to be a common need for research on certain subjects that could be expedited by joint attention. "Measuring productivity in adult education," for example.

*There appear to be possibilities for cooperation in portraying the combined impact of the diverse effort in adult education in this region using data from accountability systems already operating.

*There also would appear to be possibilities for cooperation in the identifying of needs toward which emphasis should be directed--objectives for educational activity. One respondent said, "I think it would be useful to review the entire process used in continuing education to identify the most appropriate content of continuing education in the future, whatever the agency and whatever the level, through the medium of systematic research."

*There also may be productive potential for more effective involvement of the learners--the adults--in the accountability process. Accompanying the survey responses were 84 different pieces of sample materials illustrating the techniques used in the agency concerned. In virtually all cases, these forms and documents are designed as tools for the purpose of the agency. In view of the self-directing status of the adult human being, it would seem appropriate that there be accountability instruments as <u>tools of the learner</u>.

*When this survey was being planned, it became evident that accountability was not a subject having wide appeal to graduate students in adult education and related fields in this region. Hopefully, some of the specific segments of the subject that now have been identified will be more readily saleable in graduate programs.

CONDENSATION OF RESPONSES BY CATEGORIES

PURPOSE OF AGENCY

Adult Education Training Centers cited:

- Professional development of adult educators and learners
- Preparation of teachers and other leaders
- Educational research, development and technical assistance

Associations, Non-Academic involved:

- Informal education of girls
- Rehabilitation
- Self-help (in matters such as adult education, vocational training, job placement, self-help housing, health, small business, child development)
- Continuing education and organizational development

Community Colleges used the following terms:

- Adult education (ABE, GED, Adult High School Diploma)
- Community programs
- Technical/vocational education
- Continuing education
- ESL (English as a second language)
- Basic skills
- Post high school education
- Extended education
- Development education
- Rehabilitation
- Apprenticeship
- Industrial training
- General non-credit adult education

Cooperative Extension responses used the following terms:

- Continuing education
- Education for adults and youth
- Adult education
- Informal education
- Extension education

Libraries gave two primary purposes:

- Supplement resources and services to organizations and citizens
- Provide resource materials and research services to agencies and officials of state government and legislature

Proprietary Enterprise listed:

- Vocational training and education
- Pulp manufacturing
- Consultation and writing

School Districts described their role in such terms as:

Vocational education
Adult education
Rehabilitation
Academic up-grading

University Extension employed such terms as:

Continuing education
Adult education
Off-campus education
Vocational-technical education
Non-credit and credit education

U. S. Air Force responses also cited two functions:

To provide advice and financial assistance for military personnel in pursuit of high school, college, and technical-vocational education
Continuing education for adults at all levels of achievement (includes grammar through post-Doctoral levels and occupational/technical courses and general interest non-credit instruction)

FUNDING

Differs by categories:

Adult Education Training Centers --	one all Federal, two combination of State and Federal, one combination of private and State
Associations, Non-Academic---------	mainly private and fees, one largely Federal
Community Colleges----------	combination (State, Federal, local, fees)
Cooperative Extension Services-----	combination (State, Federal, local, fees)
Libraries----------	differs by institution--some State, some local, some combination including Federal
Proprietary Enterprise----------	fees or company funds
School Districts----------	State (or Provincial), local, some grants
University Extension----------	fees, State and Federal, grants and contracts
U. S. Air Force----------	Federal

A majority of the responses indicate funding from a combination of sources.

It had seemed reasonable to those conducting the NWAEA survey that the influence of a national government as a funding source would be visible in the uniformity or standardization of accountability practice among groups of agencies dependent on such national funding. There was some apparent similarity in programs funded entirely or partially from certain departments of national government, but differences between programs having different departmental bases were such that a common pattern was not evident for all.

Institutions in six of the nine categories indicated that all or part of their support came from fees. The proportion ranged from 100% down to 5% with the distribution fairly uniform. It was not apparent that these institutions use strikingly different accountability procedures from those that are not fee-supported. It was apparent in some comments, however, that the "market" for fee-supported programs constitutes an effective accountability mechanism. A respondent from Alberta pointed out that more than half the budget for his department must come from "production of revenue" in the amount of several hundred thousand dollars. He commented, "Obviously, revenue of that scale will not be earned unless the University's 'product' in continuing education is desired by the public who pay tuition fees. That is to say, if the Department is to function successfully, it must--in every program it offers--make itself 'accountable' to the public in the market place."

DEFINITION OF ACCOUNTABILITY

Key ideas in many of the answers involved "reporting," "justifying," "results or achievements," and "sources of funds." Differences between agencies were not evident, though those involved in vocational training emphasized measurement in terms of successful employment or job acquisition and advancement. A definition from one of the answers is a capsule summary, "The reporting and justification of resources and effects."

Accountability is described in both fiscal and academic terms, and the points of responsibility are indicated separately in several instances.

EXTENT OF AGENCY CONCERN WITH ACCOUNTABILITY

Adult Education Training Centers -- Quarterly, annually and periodically.

Associations, Non-Academic -- Varies by organization, ranging from "occasional" or "no attention to subject" to monthly meetings with a board of directors.

Community Colleges -- Systematic and regular action indicated in most responses. Quarterly is most common frequency though some indicate closer intervals.

Cooperative Extension Services -- Systematic and regular action. Daily reports of time use; monthly or quarterly narrative reports; annual reports to funding sources; annual personnel evaluation.

Libraries -- Varies by institution, but evidently involves at least annual audit. In some cases attention is constant.

Proprietary Enterprise -- Systematic and regular.

School Districts -- Periodic or irregular student evaluation. Primarily concerned with finances and justification of funding.

University Extension -- Fiscal reports systematic and regular--monthly, quarterly or semester. In some cases only occasional efforts to evaluate program.

U. S. Air Force -- Recurring reports. Staff visits quarterly. Annual inspection.

TO WHOM AGENCY ACCOUNTABLE

Generally, answers relate to funding sources.

Adult Education Training Centers
Foundation Funded -- Department Chairman, Field Review Committee, Campus Advisory Committee, Practicioners, Board of Directors of private funding source
Public Funded------- State System of Higher Education, Northwest Regional Educational Laboratory, U. S. Department of Health, Education and Welfare

Associations, Non-Academic
Board of Directors, Parent Agency

Community Colleges
College District (Board), State and Federal Government for ABE
(Alaska -- responsible to University)
(Washington -- Legislature, via State Board for Community Colleges)

Cooperative Extension Services
Legislature, Land Grant University, local government, Federal government

Libraries
Legislature, Board of Directors, taxpayers

Proprietary Enterprise
Students, Board of Directors

School Districts
School Boards (Trustees), Provincial or State Department of Public Instruction

University Extension
Legislature, State Board of Education, University

U. S. Air Force
Parent Agency

TO WHOM ACCOUNTABLE AS INDIVIDUAL?

Answers in all categories consistently show an administrative hierarchy, with responsibility being directly to the person immediately above, and beyond this to higher levels of authority. Few indicated accountability to subordinates or to fellow professionals as a group.

HOW ACCOUNTABILITY INFORMATION USED?

Adult Education Training Centers--- staffing, staff development, program planning

Associations, Non-Academic--------- program planning, budgeting, evaluation

Community Colleges---------- program planning, budgeting, evaluation

Cooperative Extension Services----- program planning, budgeting, evaluation

Libraries---------- program planning, budgeting

Proprietary Enterprise---------- evaluation, program planning, budgeting

School Districts---------- budgeting, programming, student performance and teacher evaluation

University Extension---------- program planning, budgeting, evaluation

U. S. Air Force---------- program planning, budgeting, evaluation

KIND OF INFORMATION ASSEMBLED

--Expenditure of resources
--Activity reports
--Student evaluation of program and instruction
--Student placement record (and other evidences of "success")

SHARING OF ACCOUNTABILITY INFORMATION WITH OTHER AGENCIES

Adult Education Training Centers--- selective

Associations, Non-Academic--------- two say considerable sharing, two say limited or none

Community Colleges---------- with funding sources and in some cases other community colleges

Cooperative Extension Services----- fairly extensive

Libraries---------- State Office of Program Planning and Fiscal Management, other libraries in State, library users

Proprietary Enterprise---------- within the enterprise

School Districts---------- little indication

University Extension---------- some sharing within institution, limited sharing outside

U. S. Air Force---------- within agency

ARE ACCOUNTABILITY PROCEDURES USED RE SOCIAL FACTORS? (QUESTION 11)

Adult Education Training Centers--- mainly positive

Associations, Non-Academic--------- 3 out of 4 positive, with good examples including minorities

Community Colleges---------- responses varied--some negative, some positive

Cooperative Extension Services----- mainly positive responses with examples

Libraries---------- 3 to 5 responses positive, examples not outstanding

Proprietary Enterprise---------- 2 negative, 1 positive (minorities and ecology)

School Districts---------- positive responses, including minority and disadvantaged

University Extension---------- few institutions indicate concern

U. S. Air Force---------- responses positive (minority group emphasis)

SAMPLE MATERIALS ATTACHED TO RESPONSES

Adult Education Training Centers
- NW Community Education Development Center Evaluation form
- College/University Course Report
- Field Service Report
- Participant Evaluation form
- Student Evaluation
- Faculty Review form
- Goals Report -- fiscal report, etc.

Associations, Non-Academic
- Education Organizer's Monthly Report (showing numbers of students, GED test results, etc.)
- Basic Education Student Progress Report (showing individual rating on seven categories of performance)
- Employee Evaluation Report
- Report of Program and Activities for 4-Month Period (covering Agricultural Policy Development Methods Workshops, Alberta Rural Development Studies, Uniform Questionnaire response tabulation)

Community Colleges
- ABE - ESL (for recording entrance data about individual student)
- GED - Individualized English Student Profile (provides for rating of grammatical skill and mastery test score on four items)
- English Lab Record Sheet (individual record of items completed),
- SRA Power Builder Record (rewards improvement by move from one color to another)
- Material Record (individual record of materials used and stopping place)
- Attendance ABE-GED (daily class record)
- Evaluation Form (student rating of class and instructor)
- Budget Estimates (showing estimated cost and revenue by course, including a brief course outline)
- Transaction/Accumulation Register (computer print-out showing expenditures and balances)
- Lecturer Approval Form
- Request for Budget Revision
- Course Outline (cover sheet, instructions, and form)
- Proposed Course Offerings (form for listing for director of admissions and records)
- Program Budget Sheet
- Promotion and Salary Recommendation form
- Annual Up-Date of Professional Activities (form for individual reporting)
- Annual Faculty Evaluation Summary
- Evaluation for Adult General Education (form for student rating of class and instructors)
- Evening School Division Record for Term (showing classes, instructors, clock hours, class count, salary, materials and supplies, travel, tuition collected, reimbursement claimed, total income, total HR or units)
- Community Service Questionnaire (student evaluation of course to aid future planning)
- Educational Interest Survey (for public to indicate desire for courses)

Cooperative Extension Services
- Thirty-two different exhibits, including activity report forms, plan of work forms and samples, performance evaluation forms, state annual reports, and explanations of program philosophy and procedures.

Libraries
- Voucher Approval form
- Budgeting Accounting Reporting System (for cities and counties)
  - Section I - Budgeting
- Pamphlet explaining services of Multnomah County Library

Proprietary Enterprise
- Training Report Form (shows training categories, subject, sponsor, number enrolled, manhours related training, manhours job training, and total manhours)
- Summary for a Year's Training (showing total employees at a location and the number of personnel in the training function, classification or type of employee, objective of program, brief description of program, total employees trained, average length of program in hours, and effectiveness of program)
- Daily Progress Report Form (main feature is itemizing hours spent by project and by type of work; provision is included for feedback from clients, colleagues, critics, editors, or readers)

School Districts
- Teacher-Appraisal Scale -- Adult Education (form for student rating of teacher and course)
- Individual Student Progress Report, Adult Basic Education Project (to be filled out by instructor upon project completion)
- Teacher's Weekly Log (includes eight items or questions)
- Parent Interview Record (seven items covered)
- Instrumentation Guide for Project PREPARE (system for identifying and measuring accomplishment of three major objectives)

University Extension
- Student Opinion of Teaching and Course
- Off-Campus Instructor Opinion Survey
- Workshop on Alaska, Participant Survey (opinion of workshop, and data about participant)
- Proposed Extension Course (form for describing)
- Instructor's Class Record Sheet
- Extension Course Card (to compare estimate of budgeted cost and actual costs)
- Enrollment Summary, Division of Continuing Education (semester basis)
- Program Activity Memorandum -- Budget and Report
- Faculty Rating Scale (for use by deans, department chairmen, and faculty)

U. S. Air Force
- None submitted

The sample materials and the survey responses are being placed in custody of the coordinator for adult education in the School of Education at Oregon State University for a period of three years, so that they will be available for study by persons undertaking related investigations. At the end of that time these materials will likely have become obsolete and will be considered for discard.

Copies of this report may be obtained by writing to:

Dr. Walter O. Shold
Division of Continuing Education
Oregon State System of Higher Education
Extension Hall Annex
Oregon State University
Corvallis, Oregon 97331

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EXHIBIT A

NWAEA ACCOUNTABILITY SURVEY

DIRECTIONS: Respond to each item in such detail as is feasible. Additional comments or information can be attached on an extra sheet if questionnaire space is insufficient. Information concerning individual agencies (funding, etc.) will remain confidential. It is for comparative purposes among different categories.

1. Name of agency/ organization/ institution.

2. Please indicate the primary purpose or function of your agency.
   Example: continuing education, adult education, rehabilitation.

3. What is the base of funding for your agency?
   Example: state, federal, private, fee supported.
   (If funding is from a combination of sources show approximate proportions.)

4. One definition of "accountability" is: subject to giving an account; answerable; capable of being accounted for.
   Please define accountability as used by your agency.

5. To what extent does your agency concern itself with accountability?
   Example: no attention to subject, occasional efforts made, systematic and regular action.
   (If systematic and regular action indicate how frequent.)

6. To whom is your agency accountable?
   Example: legislature, parent agency, board of directors.

7. As an individual adult educator to whom are you personally accountable?
   (Indicate your position in agency.)

8. How is accountability information used by your agency?
   Example: program planning, budgeting, evaluation of instruction, student performance.

9. What kind of information is assembled for accountability purposes by your agency?
   Example: instructional format, expenditure of resources, student follow-up information.

10. Is the accountability information assembled by your agency shared with other agencies or persons?
    (If yes, indicate with whom shared and purpose for sharing.)

11. Are accountability procedures used by your agency to determine social factors affecting your agency's operation or being affected by your agency's operation?
    Example: population growth, minority group issues, ecological issues, economic concerns.
    (If yes, specify what kind of factors are included and how used.)

12. Please include a sample of materials used for accountability by your agency.
    Example: questionnaires, forms, outlines.

EXHIBIT B

AN EXAMPLE OF NEED ASSESSMENT

The University of Alberta sent explanation of a "three-pronged" process used by its Department of Extension for identifying areas of training and educational need:

1. A continuing surveillance of the various indices of the economy through reference to the periodic bulletins of Statistics Canada, the scrutiny of such reports as those which emanate from the Economic Council of Canada, and the regular review of such journals as the Financial Post, the Toronto Globe and Mail, and the various trade journals.

2. Regular consultation with corporation executives, labour union officers, trade associations, chambers of commerce, and the education committees of professional and para-professional organizations.

3. Consultation with a substantial network of advisory committees (inclusive of lay membership).

Effectiveness of this three-pronged approach "is demonstrated by growth in the total number of students enrolled in on-going programs and the relatively few programs which have had to be cancelled for lack of takers."

EXHIBIT C

ADULT EDUCATION PROGRAM PERFORMANCE ACCOUNTABILITY SYSTEM

Portland Community College (under contract with the State Department of Education) is operating a data processing system that assists 13 Oregon Community Colleges to meet HEW requirements and other adult education accountability necessities. The system involves a standardized code for recording certain information about the individual student at registration, including performance levels in reading and certain other subject areas deemed relevant by the instructor. Progress in advancing these skill levels is added to the record as tests demonstrate mas[illegible] Hours of instruction also are recorded so that hours required per unit o[illegible] advancement can be calculated. Reasons for student separations are recorded.

The system provides printouts showing progress reports for each instructor, progress and separation data for all students, a status report by student, and various special data combinations as requested.

The system presently serves some 10,000 students.

EXHIBIT D

EXTENSION MANAGEMENT INFORMATION SYSTEM

The State Management Information System (SEMIS) is designed to provide information to Extension Service managers at all levels in the organization. Each state and territorial cooperative Extension Service has the capability through their Information System to supply compatible data through a national data base maintained by the Extension Service, U. S. Department of Agriculture. The System is capable of meeting the unique needs of individual State Extension Services while being able to convert to a common language base with all other State Extension Services. SEMIS now is accumulating data from approximately one thousand professional and para-professional workers in Oregon, Washington, Idaho, Montana and Alaska.

The System has two principal components: The Plan of Work and the Activity Files. These files interact and are compatible with each other through a connecting link called the Line Item Task.

The Plan of Work is developed annually by each individual professional staff member. These plans are identified by predetermined codes and filed in a computer program. These plans are updated during the year as changes occur. The principal items identified in the Plan of Work are: each individual, each planning unit (grouping of individuals for program planning, delivery and evaluation), the identification of the subject, the audience and the allocation of man-days to accomplish the task. The task is a selected objective with a related set of activities selected for objective accomplishment.

The Activity File identifies the expenditure of effort toward the accomplishment of planned and unplanned work in time increments of hours and man-days. In addition to the elements identified in the Plan of Work, the Activity File includes the identification and count of audiences contacted and the ethnic identification of the participants in Extension Service programs. It also identifies the work done especially for low income clientele.

Several optional fields are reserved in the computer system for use of the individual State Extension Service for the collection and storage of data that is of particular importance in the state and not of national concern. These are both quantitative and qualitative fields so items can be defined and identified by code and counts of items can be maintained. The retrieval of data is not predetermined so it can be retrieved in any format with any comparison of the variables maintained as separate elements.

The elements of the System include the following:

1. Purposes or a list of statements of intent that identify educational programs in terms of clientele benefits.

2. Income characteristics of the clientele identifying the program for low income and general income participants.

3. Task as an identification of the annual objective of the individual's educational program.

4. Subject of the educational effort.

5. The type of audience receiving the education.

6. Ethnic characteristics of the audience by number of contacts with Caucasians, Blacks, American Indians, Orientals and others.

7. Total number of contacts each day in the accomplishment of each objective.

8. Number of man-hours planned and expended on each activity.

Many states use an optional field to identify methods and techniques. Optional fields are often used to identify mass media, distribution of bulletins, other educational materials and the efforts of volunteers and educational aides.

Narrative data defining clientele problem situations, educational objectives, specific activities, responsible staff members and analysis of program accomplishment support the data stored in the form of codes and counts in the computerized system.

The Management Information System is related to a personnel Subsystem that maintains a current record of pertinent information about each professional staff member that is supplying information to the Management Information System.